

Leave Donation Process Overview

The Leave Donation Process in Cardinal does not allow employees to enter a donation leave request (DLR) directly. Employees who wish to donate leave to another employee should follow agency policy and procedures.

Use the **Adjust Absences** pages to manually create the appropriate balance adjustments for the donor and recipient (similar to the way you make balance adjustments for other leave types) for both leave donations and the return of unused donated leave. The **Donated Leave Usage Report Query (V_TA_DONATED_LEAVE)** can be used to identify unused leave that should be returned.

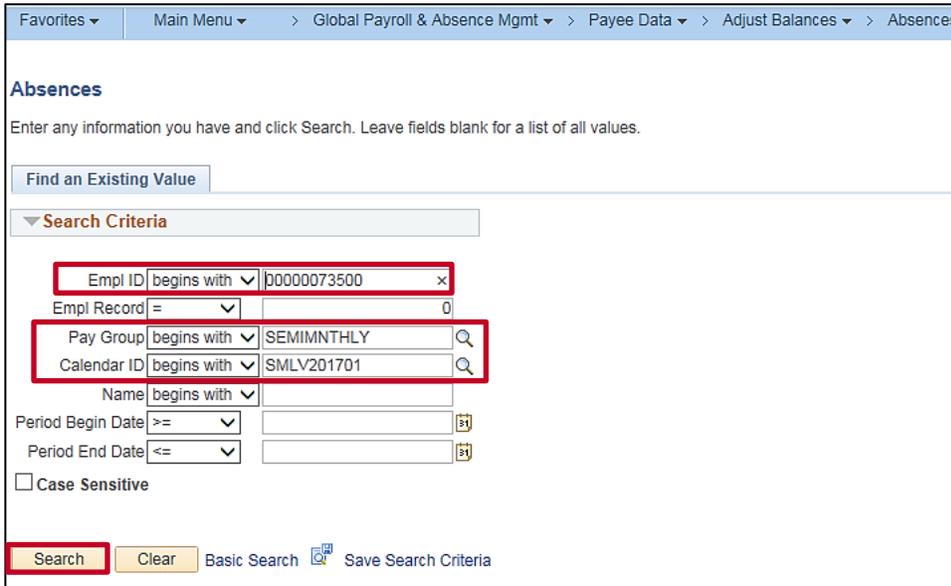
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Entering Leave Donation Adjustments

1. Navigate to the **Absences** page using the following path:

Cardinal HCM > Global Payroll & Absence Mgmt > Payee Data > Adjust Balances > Absences



Favorites ▾ Main Menu ▾ > Global Payroll & Absence Mgmt ▾ > Payee Data ▾ > Adjust Balances ▾ > Absences

Absences

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

Empl ID begins with ▾ 00000073500 x

Empl Record = ▾ 0

Pay Group begins with ▾ SEMIMNTHLY 🔍

Calendar ID begins with ▾ SMLV201701 🔍

Name begins with ▾

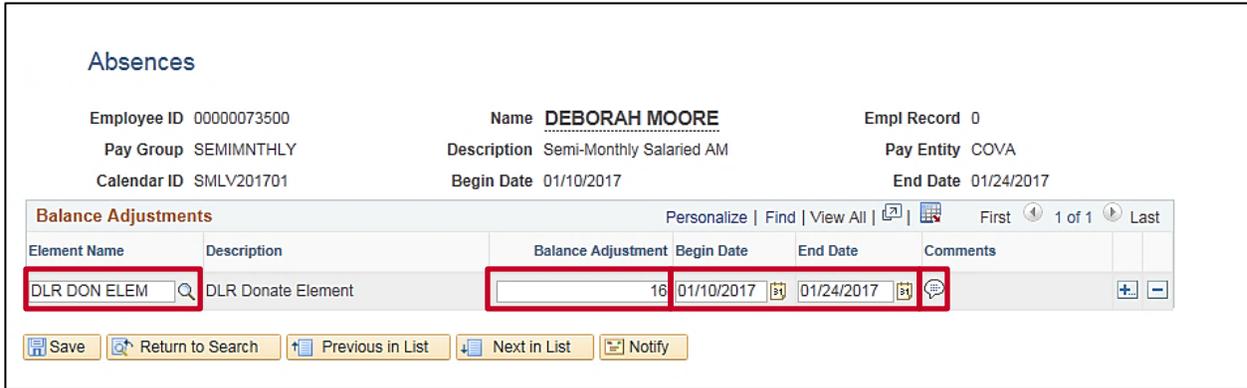
Period Begin Date >= ▾

Period End Date <= ▾

Case Sensitive

Search Clear Basic Search Save Search Criteria

2. Enter the donor's **Empl ID** number.
3. Select the **Pay Group**.
4. Choose the **Calendar ID** for the pay period the balance adjustment should occur. This is the period the leave is to become available to the recipient.
5. Click the **Search** button.



Absences

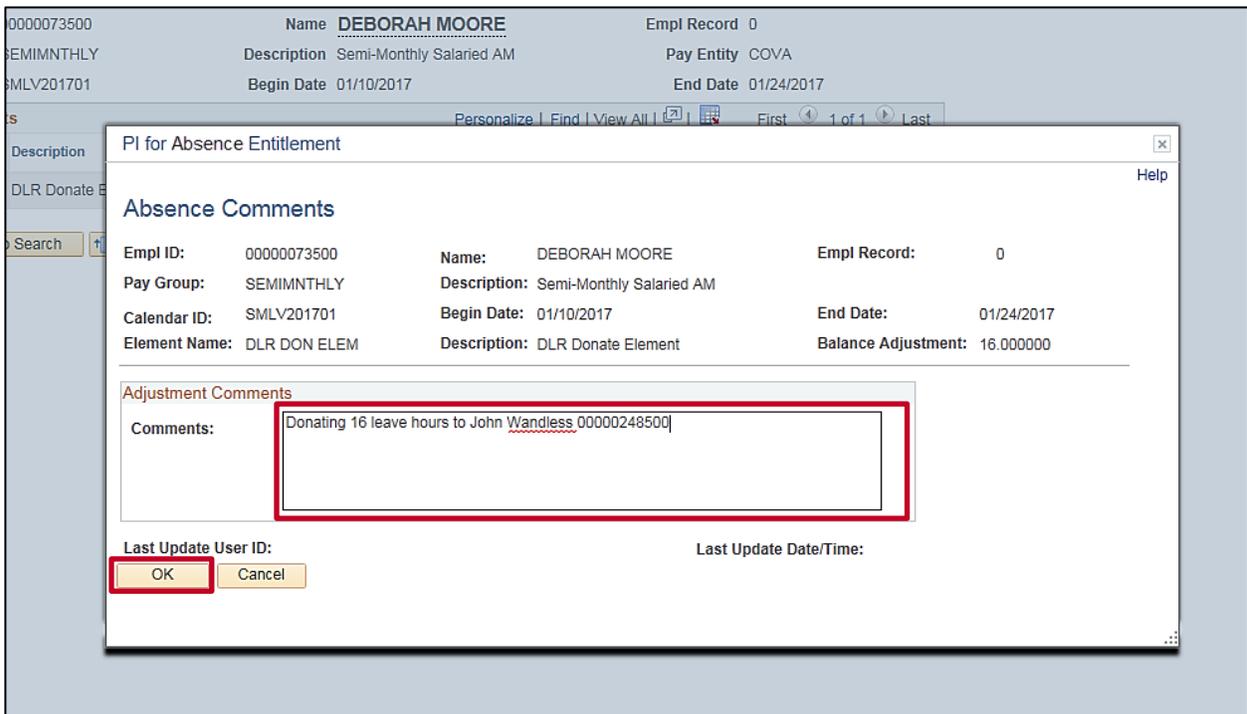
Employee ID 0000073500 Name **DEBORAH MOORE** Empl Record 0
 Pay Group SEMIMNTHLY Description Semi-Monthly Salaried AM Pay Entity COVA
 Calendar ID SMLV201701 Begin Date 01/10/2017 End Date 01/24/2017

Balance Adjustments Personalize | Find | View All | First 1 of 1 Last

Element Name	Description	Balance Adjustment	Begin Date	End Date	Comments
DLR DON ELEM	DLR Donate Element	16	01/10/2017	01/24/2017	

Save Return to Search Previous in List Next in List Notify

6. The **Absences** page displays.
7. In the **Element Name** field, select **DLR DON ELEM**.
8. The **Begin Date** and **End Date** prefill based on the calendar selected. These prefill after you select the **Element Name**.
9. In the **Balance Adjustment** field enter the appropriate hours as a positive amount of leave that should be donated by the donor. For this scenario, enter **16** hours.
10. Click the **Comments** icon.



0000073500 Name **DEBORAH MOORE** Empl Record 0
 SEMIMNTHLY Description Semi-Monthly Salaried AM Pay Entity COVA
 SMLV201701 Begin Date 01/10/2017 End Date 01/24/2017

PI for Absence Entitlement Help

Absence Comments

Emp ID: 0000073500 Name: DEBORAH MOORE Empl Record: 0
 Pay Group: SEMIMNTHLY Description: Semi-Monthly Salaried AM
 Calendar ID: SMLV201701 Begin Date: 01/10/2017 End Date: 01/24/2017
 Element Name: DLR DON ELEM Description: DLR Donate Element Balance Adjustment: 16.000000

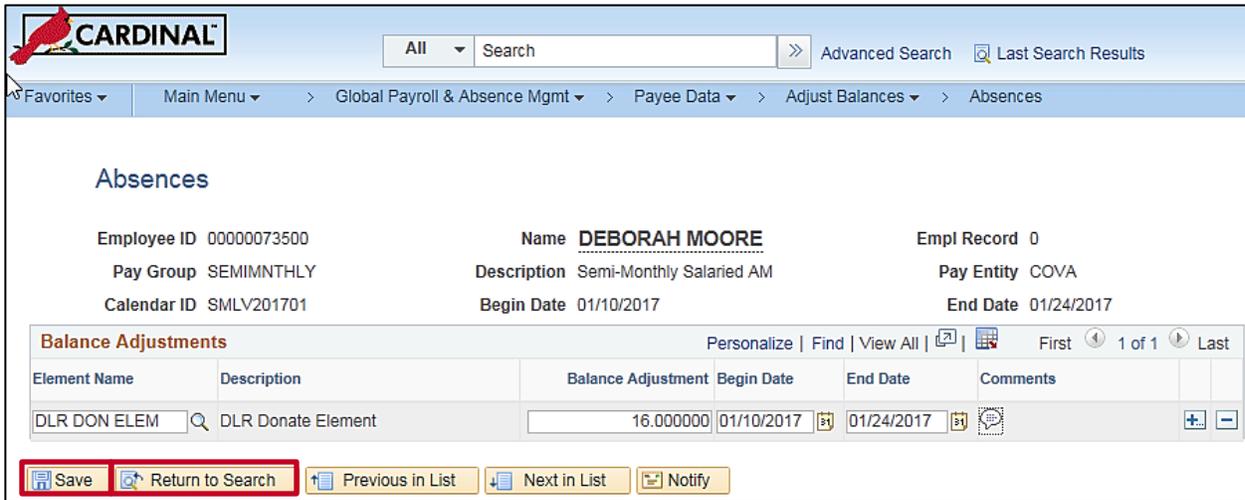
Adjustment Comments

Comments: Donating 16 leave hours to John Wandless 00000248500

Last Update User ID: Last Update Date/Time:

OK Cancel

11. The **Absence Comments** pop-up window displays. Enter the appropriate comments.
12. Click the **OK** button.



Cardinal All Search Advanced Search Last Search Results

Favorites Main Menu Global Payroll & Absence Mgmt Payee Data Adjust Balances Absences

Absences

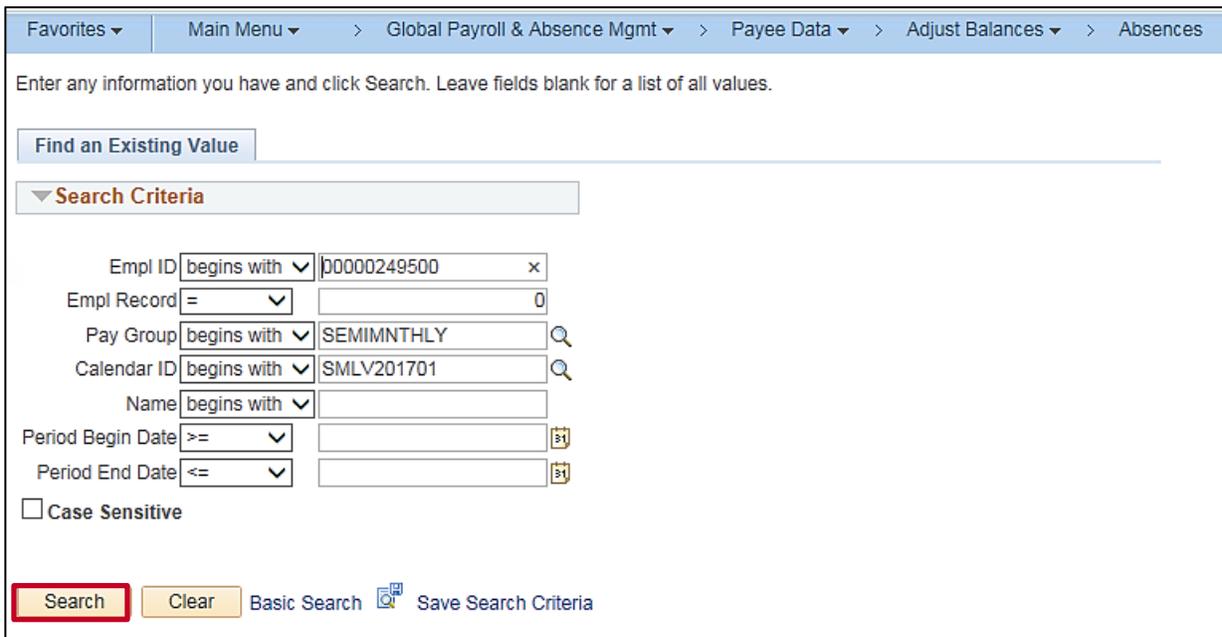
Employee ID 00000073500 Name **DEBORAH MOORE** Empl Record 0
 Pay Group SEMIMNTHLY Description Semi-Monthly Salaried AM Pay Entity COVA
 Calendar ID SMLV201701 Begin Date 01/10/2017 End Date 01/24/2017

Balance Adjustments Personalize Find View All First 1 of 1 Last

Element Name	Description	Balance Adjustment	Begin Date	End Date	Comments
DLR DON ELEM	DLR Donate Element	16.000000	01/10/2017	01/24/2017	

Save Return to Search Previous in List Next in List Notify

13. The **Absences** page returns.
14. Click the **Save** button.
15. For this scenario, the adjustment was made for the donor, now the adjustment must be made for the recipient. Click the **Return to Search** button.



Favorites Main Menu Global Payroll & Absence Mgmt Payee Data Adjust Balances Absences

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

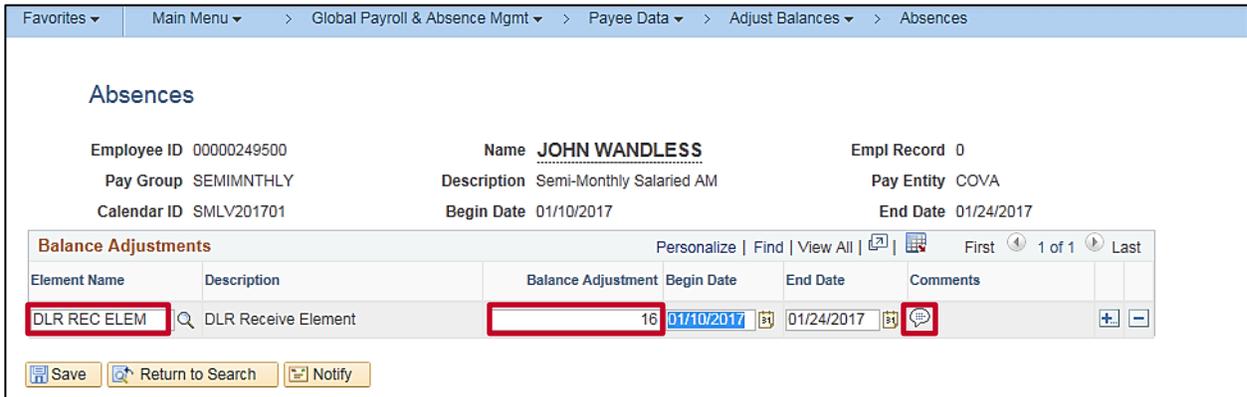
▼ Search Criteria

Empl ID begins with 00000249500 x
 Empl Record = 0
 Pay Group begins with SEMIMNTHLY
 Calendar ID begins with SMLV201701
 Name begins with
 Period Begin Date >=
 Period End Date <=

Case Sensitive

Search Clear Basic Search Save Search Criteria

16. Enter the **Empl ID** number.
17. Choose the **Calendar ID** for the pay period the balance adjustments should occur. This is the period the leave is to become available to the recipient. This should match what you input for the leave donor.
18. Click the **Search** button.
19. The **Absences** page displays.

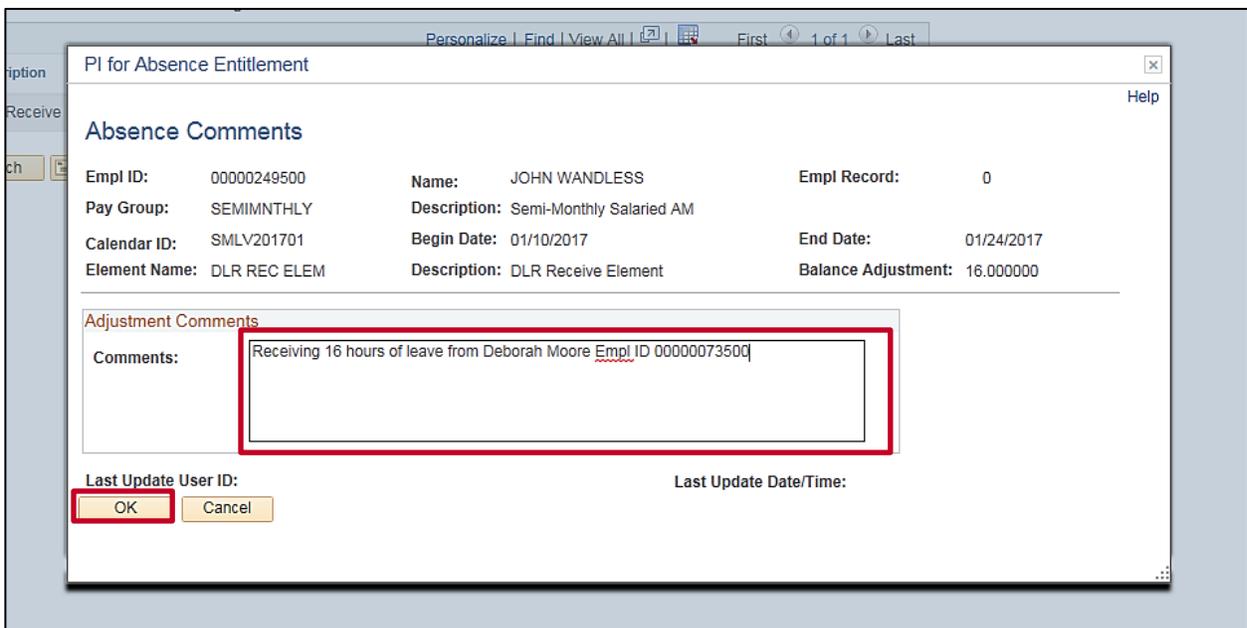


Absences

Employee ID 00000249500 Name **JOHN WANDLESS** Empl Record 0
 Pay Group SEMIMNTHLY Description Semi-Monthly Salaried AM Pay Entity COVA
 Calendar ID SMLV201701 Begin Date 01/10/2017 End Date 01/24/2017

Element Name	Description	Balance Adjustment	Begin Date	End Date	Comments
DLR REC ELEM	DLR Receive Element	16	01/10/2017	01/24/2017	

20. To adjust the recipient's leave, select **DLR REC ELEM** for the **Element Name**.
21. For **Balance Adjustment**, enter the hours as a positive number to increase the balance. In this scenario, enter **16**. The **Begin Date** and **End Date** fields prefill.
22. Click the **Comments** icon.



PI for Absence Entitlement

Absence Comments

Empl ID: 00000249500 Name: JOHN WANDLESS Empl Record: 0
 Pay Group: SEMIMNTHLY Description: Semi-Monthly Salaried AM
 Calendar ID: SMLV201701 Begin Date: 01/10/2017 End Date: 01/24/2017
 Element Name: DLR REC ELEM Description: DLR Receive Element Balance Adjustment: 16.000000

Adjustment Comments

Comments: Receiving 16 hours of leave from Deborah Moore Empl ID 0000073500

Last Update User ID: **OK** Last Update Date/Time: Cancel

23. The **Absence Comments** pop-up window displays. Enter your comments.
24. Click the **OK** button to return to the **Absences** page.

Favorites ▾ Main Menu ▾ > Global Payroll & Absence Mgmt ▾ > Payee Data ▾ > Adjust Balances ▾ > Absences

Absences

Employee ID 00000249500 Name **JOHN WANDLESS** Empl Record 0
 Pay Group SEMIMNTHLY Description Semi-Monthly Salaried AM Pay Entity COVA
 Calendar ID SMLV201701 Begin Date 01/10/2017 End Date 01/24/2017

Balance Adjustments Personalize | Find | View All | | First 1 of 1 Last

Element Name	Description	Balance Adjustment	Begin Date	End Date	Comments
DLR REC ELEM	DLR Receive Element	16.000000	01/10/2017	01/24/2017	

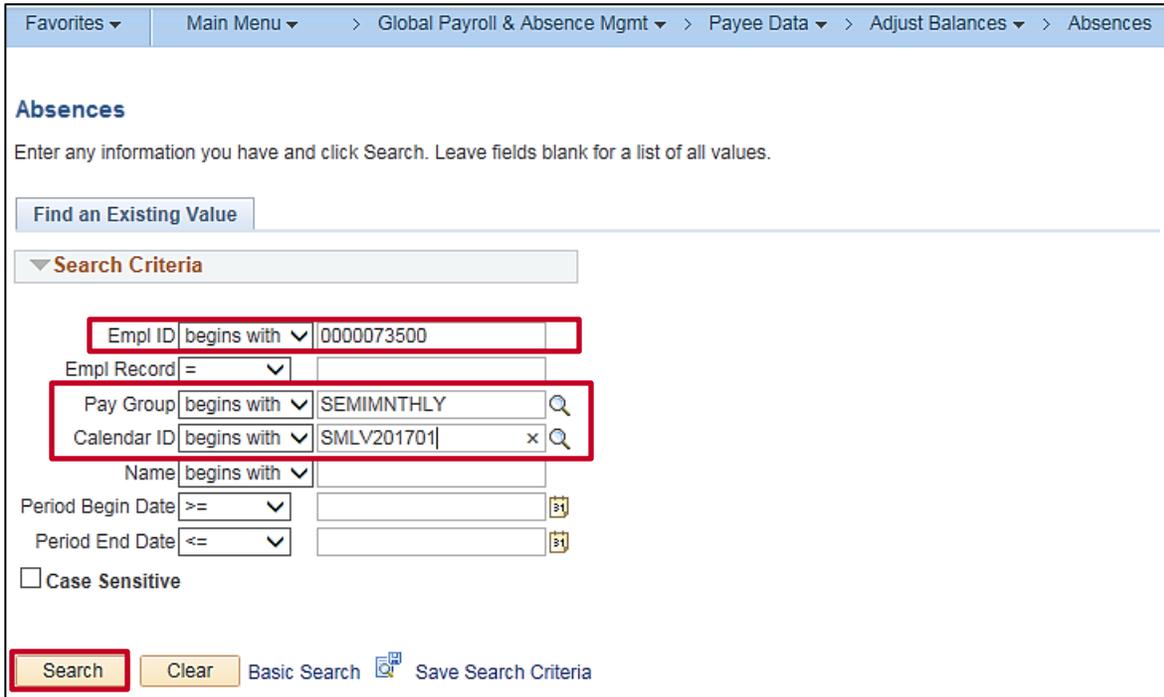
25. Click the **Save** button.
26. The adjustment process has been completed.

Note: The donor and recipient absence balances update when the normal Calculate Absence and Payroll process runs, which is generally daily. The donor’s leave balance will be reduced by the donated amount and the recipient’s DLR balance will be increased by the donated amount. The recipient can use the DLR hours after the Calculate Absence and Payroll process has run, even though the leave adjustment is not visible to them. The balance adjustments are not visible to the employee until the pay period has been finalized.

Entering Leave Return Adjustments

1. Navigate to the **Absences** page using the following path:

Cardinal HCM > Global Payroll & Absence Mgmt > Payee Data > Adjust Balances > Absences



Favorites > Main Menu > Global Payroll & Absence Mgmt > Payee Data > Adjust Balances > Absences

Absences

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

Empl ID begins with ▼ 0000073500

Empl Record = ▼

Pay Group begins with ▼ SEMIMNTHLY 🔍

Calendar ID begins with ▼ SMLV201701 ✕ 🔍

Name begins with ▼

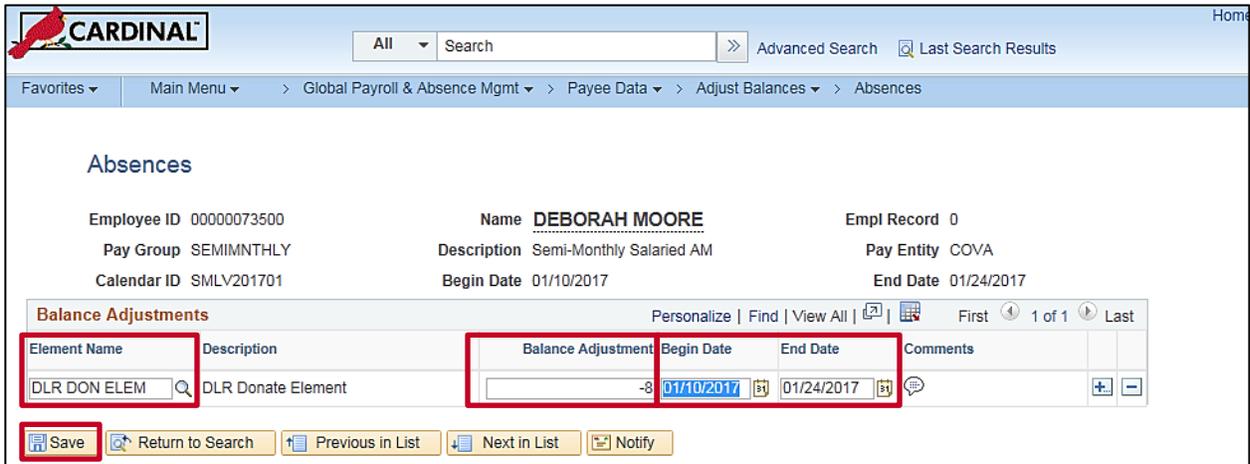
Period Begin Date >= ▼

Period End Date <= ▼

Case Sensitive

Search Clear Basic Search Save Search Criteria

2. The **Absences** search page displays. Enter the donor's **Empl ID** number.
3. Choose the **Calendar ID** for the pay period the return adjustments should occur.
4. Click the **Search** button.



Absences

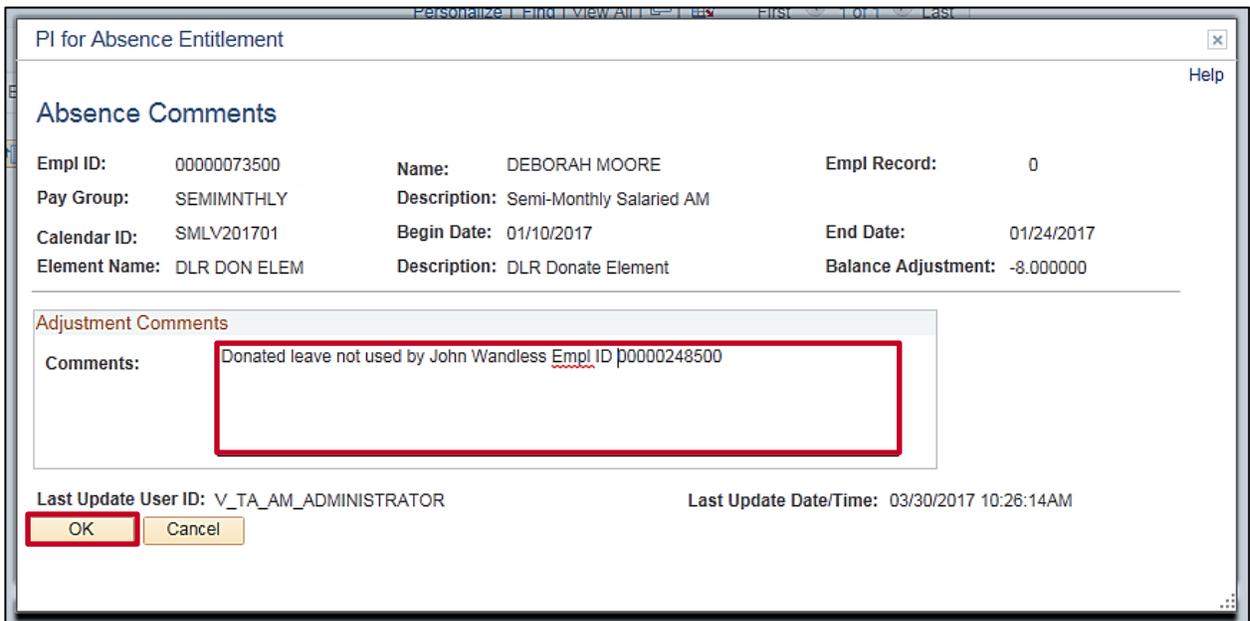
Employee ID 0000073500 Name DEBORAH MOORE Empl Record 0
 Pay Group SEMIMNTHLY Description Semi-Monthly Salaried AM Pay Entity COVA
 Calendar ID SMLV201701 Begin Date 01/10/2017 End Date 01/24/2017

Balance Adjustments

Element Name	Description	Balance Adjustment	Begin Date	End Date	Comments
DLR DON ELEM	DLR Donate Element	-8	01/10/2017	01/24/2017	

Buttons: Save, Return to Search, Previous in List, Next in List, Notify

5. The **Absences** page displays. In the **Element Name** field, select **DLR DON ELEM**.
6. In the **Balance Adjustment** field, enter the hours that should be returned to the donor as a negative number. In this scenario, enter **-8**.
7. The **Begin Date** and **End Date** will prefill based on the calendar selected. These prefill after you select the **Element Name**.
8. Click the **Comments** icon.



PI for Absence Entitlement

Absence Comments

Empl ID: 0000073500 Name: DEBORAH MOORE Empl Record: 0
 Pay Group: SEMIMNTHLY Description: Semi-Monthly Salaried AM
 Calendar ID: SMLV201701 Begin Date: 01/10/2017 End Date: 01/24/2017
 Element Name: DLR DON ELEM Description: DLR Donate Element Balance Adjustment: -8.000000

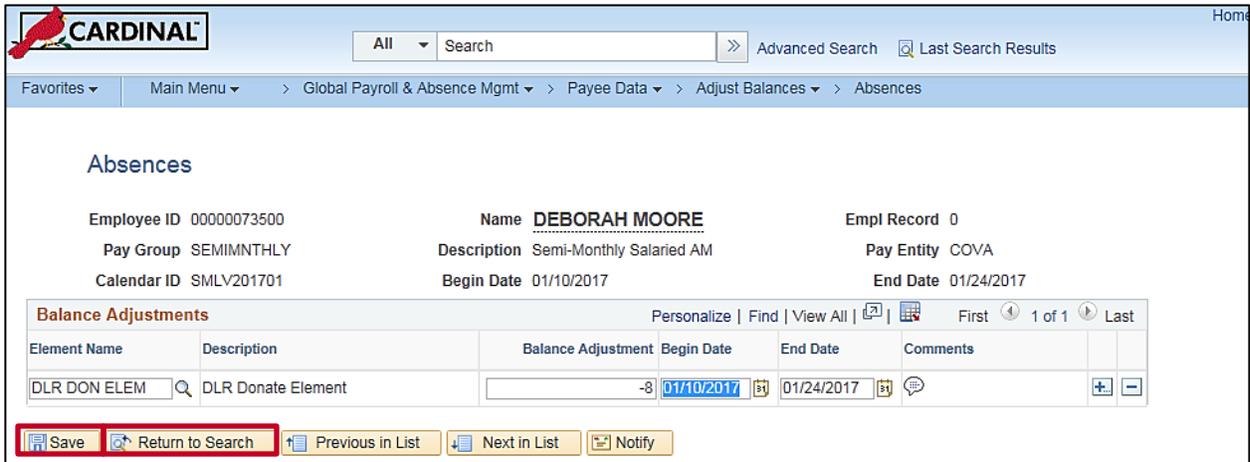
Adjustment Comments

Comments: Donated leave not used by John Wandless Empl ID 00000248500

Last Update User ID: V_TA_AM_ADMINISTRATOR Last Update Date/Time: 03/30/2017 10:26:14AM

Buttons: OK, Cancel

9. The **Absence Comments** pop-up window displays. Enter the appropriate comments.
10. Click the **OK** button.



Cardinal | All | Search | Advanced Search | Last Search Results

Favorites | Main Menu | Global Payroll & Absence Mgmt | Payee Data | Adjust Balances | Absences

Absences

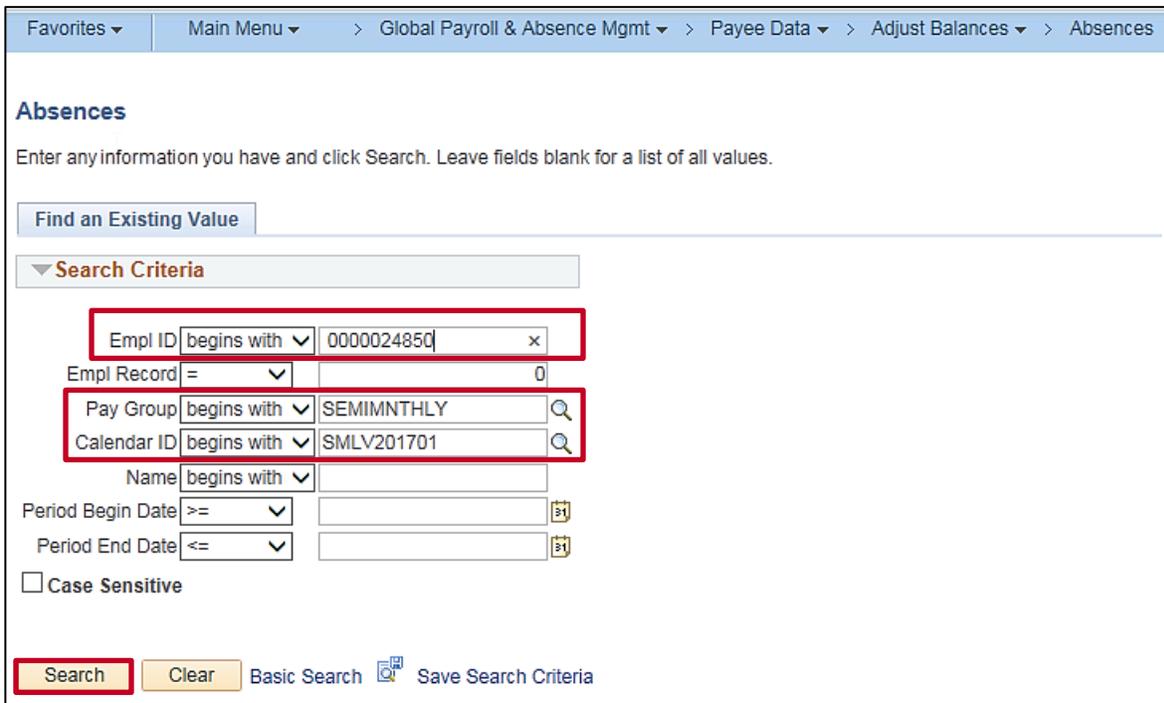
Employee ID 0000073500 Name DEBORAH MOORE Empl Record 0
 Pay Group SEMIMNTHLY Description Semi-Monthly Salaried AM Pay Entity COVA
 Calendar ID SMLV201701 Begin Date 01/10/2017 End Date 01/24/2017

Balance Adjustments Personalize | Find | View All | First | 1 of 1 | Last

Element Name	Description	Balance Adjustment	Begin Date	End Date	Comments
DLR DON ELEM	DLR Donate Element	-8	01/10/2017	01/24/2017	

Save | **Return to Search** | Previous in List | Next in List | Notify

11. The **Absences** page returns. Click the **Save** button.
12. In this scenario, the adjustment was made for the donor, now the adjustment must be made for the recipient. Click the **Return to Search** button.



Favorites | Main Menu | Global Payroll & Absence Mgmt | Payee Data | Adjust Balances | Absences

Absences

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

Empl ID begins with 0000024850

Empl Record = 0

Pay Group begins with SEMIMNTHLY

Calendar ID begins with SMLV201701

Name begins with

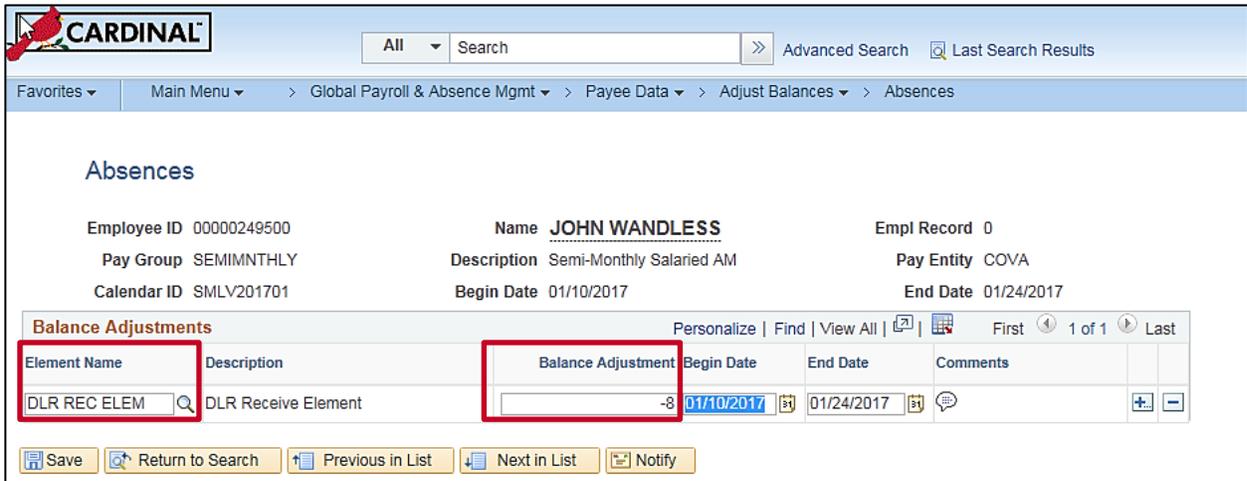
Period Begin Date >=

Period End Date <=

Case Sensitive

Search | Clear | Basic Search | Save Search Criteria

13. The **Absences** search page displays.
14. Select the **Pay Group**.
15. Choose the **Calendar ID** for the pay period the return adjustments should occur. This should match what you input for the leave donor.
16. Click the **Search** button.



Cardinal All Search >> Advanced Search Last Search Results

Favorites Main Menu > Global Payroll & Absence Mgmt > Payee Data > Adjust Balances > Absences

Absences

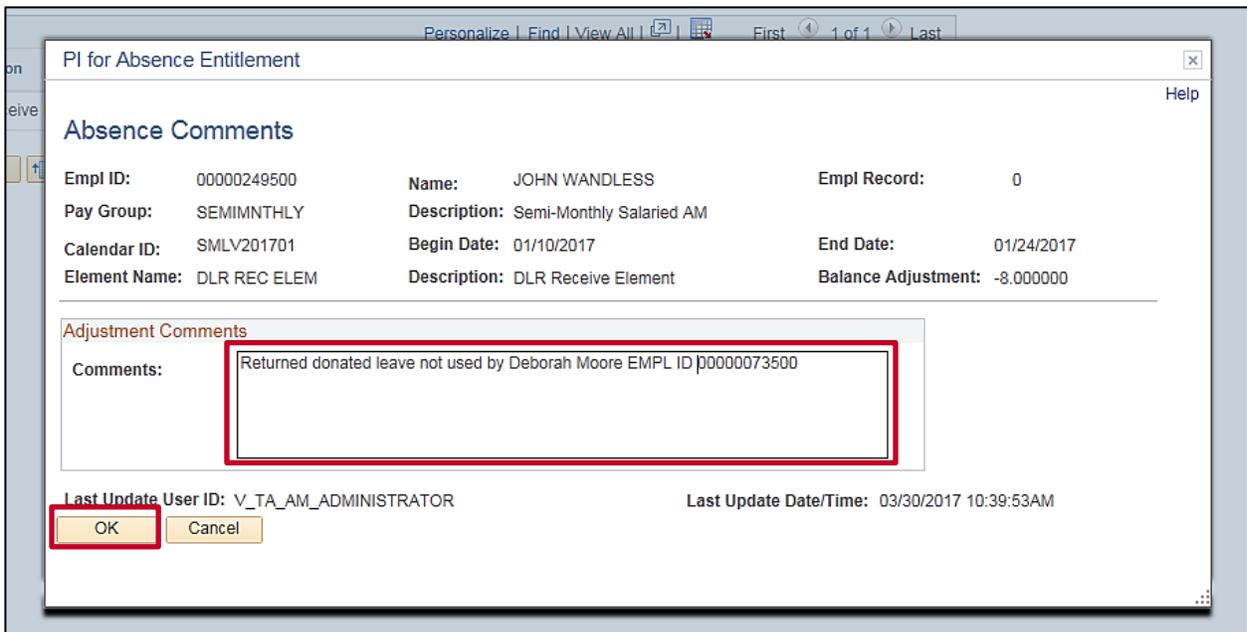
Employee ID 00000249500 Name **JOHN WANDLESS** Empl Record 0
 Pay Group SEMIMNTHLY Description Semi-Monthly Salaried AM Pay Entity COVA
 Calendar ID SMLV201701 Begin Date 01/10/2017 End Date 01/24/2017

Balance Adjustments Personalize Find View All First 1 of 1 Last

Element Name	Description	Balance Adjustment	Begin Date	End Date	Comments
DLR REC ELEM	DLR Receive Element	-8	01/10/2017	01/24/2017	

Save Return to Search Previous in List Next in List Notify

17. To adjust the recipient's leave, select **DLR REC ELEM** for the **Element Name**.
18. For **Balance Adjustment**, enter the hours as a negative number. In this scenario, enter **-8**.



Personalize Find View All First 1 of 1 Last

PI for Absence Entitlement Help

Absence Comments

Empl ID: 00000249500 Name: JOHN WANDLESS Empl Record: 0
 Pay Group: SEMIMNTHLY Description: Semi-Monthly Salaried AM
 Calendar ID: SMLV201701 Begin Date: 01/10/2017 End Date: 01/24/2017
 Element Name: DLR REC ELEM Description: DLR Receive Element Balance Adjustment: -8.000000

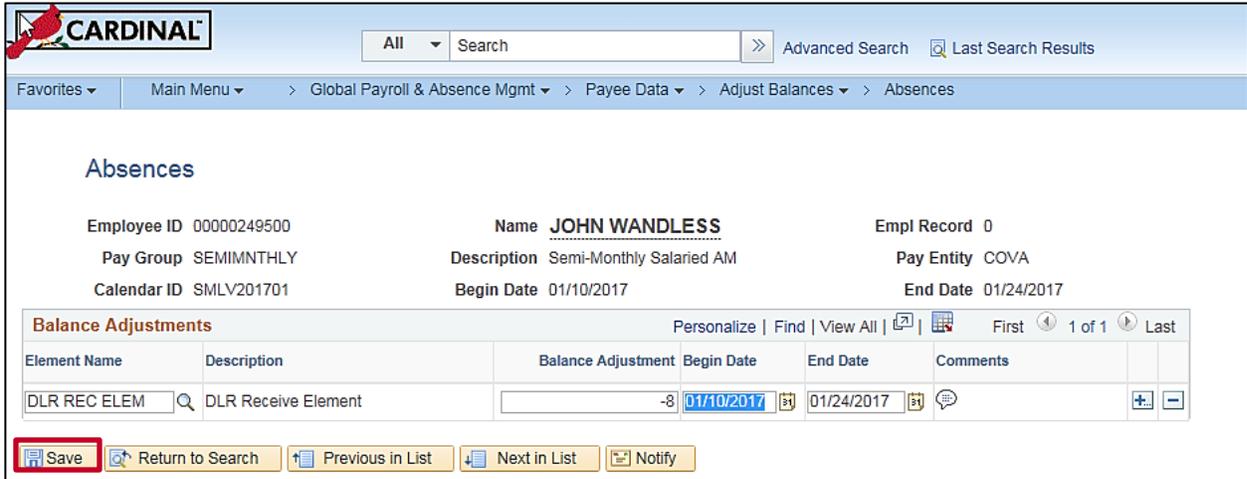
Adjustment Comments

Comments: Returned donated leave not used by Deborah Moore EMPL ID 00000073500

Last Update User ID: V_TA_AM_ADMINISTRATOR Last Update Date/Time: 03/30/2017 10:39:53AM

OK Cancel

19. Click the **Comments** icon.
20. The **Absence Comments** pop-up window displays. Enter an appropriate comment based on the adjustment being made.
21. Click the **OK** button to return to the **Absences** page.



CARDINAL All Search >> Advanced Search Last Search Results

Favorites Main Menu > Global Payroll & Absence Mgmt > Payee Data > Adjust Balances > Absences

Absences

Employee ID 00000249500 Name **JOHN WANDLESS** Empl Record 0
 Pay Group SEMIMNTHLY Description Semi-Monthly Salaried AM Pay Entity COVA
 Calendar ID SMLV201701 Begin Date 01/10/2017 End Date 01/24/2017

Balance Adjustments Personalize | Find | View All | First 1 of 1 Last

Element Name	Description	Balance Adjustment	Begin Date	End Date	Comments
DLR REC ELEM	DLR Receive Element	-8	01/10/2017	01/24/2017	

Save Return to Search Previous in List Next in List Notify

22. Click the **Save** button.
23. The adjustment process has been completed.

Note: The absence balances update when the normal Calculate Absence and Payroll process runs, which is generally daily. The donor's vacation balance will be increased by the returned amount and the recipient's DLR balance will be decreased by the returned amount. The balance adjustments are not visible to the employee until the pay period has been finalized.